



**MORE** THAN TAX

## Individual Tax Return Checklist - Basic

### Your Details

### Spouse Details

Full Name:

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Phone/Mobile:

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Email:

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Address:

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Occupation:

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Do you have any dependent children? If so, how many?

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Please provide bank details to receive tax refund via EFT

Name:

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BSB:

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Account Number:

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## More Than Tax - Individual Tax Return Checklist

<i>Income</i>	<i>Tick if relevant</i>	<b>Your Details</b> <i>Amount \$</i>	<b>Spouse Details</b> <i>Amount \$</i>	<b>Supporting Documents</b>
Income Statements				
Pensions or government payments				
Employer Lump Sum & Termination Payment Summaries				
Bank interest earned				
Rental Properties ( <a href="#">click here</a> to our Rental Property Checklist)				
Business Income <i>(Profit &amp; Loss or access to software)</i>				
Foreign Income				
Capital Gain/Loss <i>(inc. crypto currency trades, gifts, swaps, fiat currency conversion and bills paid via crypto)</i>				
Employee Share Schemes				
Dividend, Distribution & Managed Fund Income				
Australia Superannuation Lump Sum Payment or Income Stream				

  

<i>Deductions/Expenses</i>	<i>Tick if relevant</i>	<b>Your Details</b> <i>Amount \$</i>	<b>Spouse Details</b> <i>Amount \$</i>	<b>Supporting Documents</b>
Work related expenses:				
Motor Vehicle ( <u>work-to-work</u> travel only, please provide car model, rego and kms travelled; otherwise 12 consecutive weeks logbook must be kept and provided)				
Parking ( <u>work-to-work</u> travel only)				
Travel <i>(fares &amp; accomodation)</i>				

**Deductions/Expenses***Tick if relevant***Your Details***Amount \$***Spouse Details***Amount \$***Supporting****Documents****Work related expenses:**

Compulsory Uniform with logo/Protective clothing

Self-education & professional development *(directly related to your occupation)*

Union Fees and Professional Registration Fees

Subscription and Memberships

Seminars, webinars and conferences

Home Office Hours *(timesheet, roster or diary must be kept & provided)*Home Office Furniture *(office desk, chair, study lamp etc. Purchase date and amount required)*

Electricity &amp; Gas, Cleaning

*(Provide cost per unit of power, average units of power used & total annual WFH hours. 4-week diary must be kept)*

Mobile Phone &amp; Home Internet

*(monthly bills, work related % only. 4-week diary or itemised bill must be kept)*

Computer consumables

Tools &amp; Equipment &gt; \$300

Printing &amp; Stationery

Any other costs incurred in earning income

Donations to charities or building funds

Income protection insurance *(under personal name only)*

Personal Superannuation Contribution

Prior year accounting fees *(for new clients only)***Do you have Private Health Insurance?** *(Hospital or combined)**(If yes, please provide your private health insurance tax statements showing names of all persons covered in policy)*